# Grocery Sales in Non-Food Stores Continue to Increase Steadily

For seven of the 10 categories tracked, the net gains in discount store grocery purchases exceeded 10 percent. (The net increase is the difference between the percent of respondents who reported increased purchases minus the percent who reported decreased purchases.)

In drug stores, the net increases in grocery purchases exceeded 10 percent in five of the 10 categories tracked.

Drug stores also did better this year than in 1989, when they registered net decreases in five out of nine categories tracked. This year, the only net decrease was in the beer, wine and alcohol category, which was down 2 percent.

For drug stores, the strongest growth was in the following product categories:

- laundry and cleaning supplies, 53 percent net gain;
- pet foods and supplies, 50 percent net increase;
- garbage bags, 15 percent;
- candy/gum, 14 percent;
- household paper supplies, 14 percent; and
- laundry and cleaning supplies, 13 percent.

*The number of grocery purchases in drug and discount stores increased over last year for every category tracked in FM's third annual consumer buying survey.*

Discount stores' strongest increases were in these categories:

- laundry and cleaning supplies, 22 percent;
- packaged groceries, 21 percent;
- non-alcoholic beverages, 36 percent;
- packaged groceries, 33 percent; and
- household paper supplies, 16 percent.

# It's Getting Closer, But Shopping for Food At Non-Food Stores Hasn't Hit Weekly Rate

Although consumers who buy groceries in non-food stores buy more often than ever before, they still aren't up to a weekly basis.

In discount stores, just 15 percent of shoppers who buy candy do so once a week or more; at more convenient drug stores, 14 percent.

More than a third, 36 percent, buy candy at discount stores two or three times a month; another 28 percent make this type of purchase at discount stores at least once a month.

By comparison, 14 percent buy candy at a drug store two or three times a month, and another 32 percent once a month.

Chips and snacks do sell faster in drug stores than they do in discount stores. A total of 18 percent of respondents buy these items weekly and 59 percent monthly at drug stores, compared with 12 percent and 50 percent at discount stores.

But discount stores can get soft drink shoppers to buy soda in their stores more often than drug stores can. Fifteen percent of all people who buy soft drinks in discount stores said they do so at least once a week; 40 percent said two or three times a month; and 27 percent once a month.

Just 12 percent of drug store shoppers who buy soft drinks report making purchases once a week or more; 23 percent do it two or three times a month, and 15 percent once a month.

### Key differences

Juices, bottled waters, beer, wine and other alcoholic beverages have relatively low frequencies of purchase in discount stores, but are purchased much more often in drug stores.

For example, 45 percent of all drug store shoppers who purchase juice or bottled waters make a purchase at least once a week or more compared to only 3 percent of the shoppers who buy these items in discount stores.

### Frequency rates differ

But discount stores generate higher-frequency sales of packaged groceries, cleaning products, and pet foods than drug stores are able to produce.

Fourteen percent of all shoppers who buy packaged groceries in discount stores, for example, buy something there once a week or more; 43 percent buy there two or three times a month.

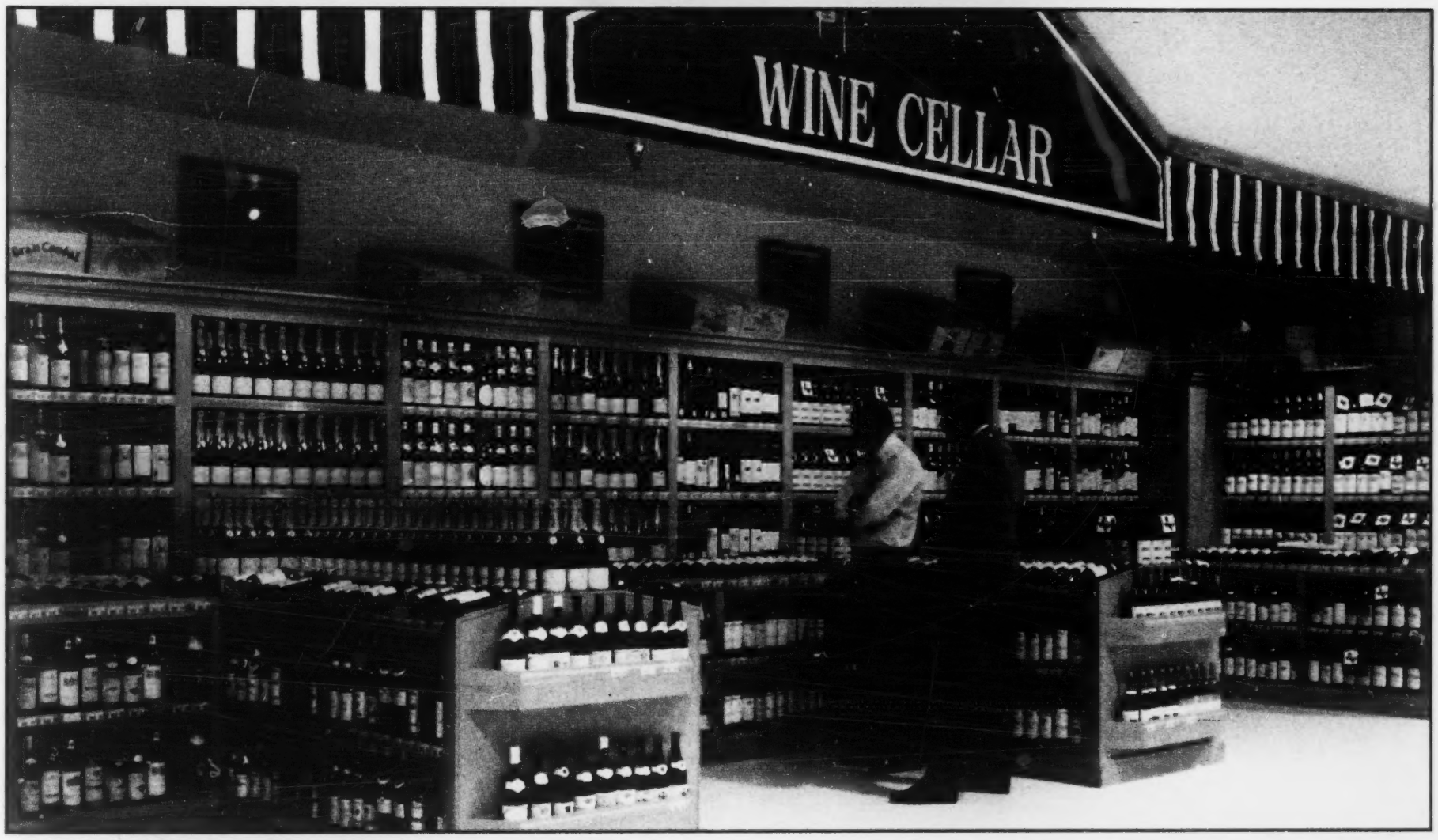
In drug stores, no one makes a dry grocery purchase that often. Only 3 percent will buy a dry grocery item there once a month, and 3 percent will do so once every two or three months.

This, of course, reflects the fact that more discount stores than drug stores tend to stock dry groceries everyday. Most drug stores only carry dry groceries on an in-and-out basis as they get a good deal. Only selected stores stock convenience groceries everyday, and that makes drug groceries less accessible to the total universe of shoppers.

**How much consumers spend for groceries in non-food stores**

| Type of grocery | Median amount spent | |
|---|---|---|
| | Discount store | Drug store |
| Edible dry grocery | $35 | $ 5 |
| Non-edible | $25 | $15 |

*Source: Fairfield Research*




*To capitalize on the current interest in premium wines, beers, and spirits, many chains boutique their liquor departments.*

# Alcohol Sales Flatten, But Premium Brands Are Up

*Buyers say sales of expensive vodkas, California varietal wines, and ultra-premium and imported beers are up this year.*

The alcohol category had its bright and dim spots at drug and discount chains this past year. Overall, sales in the major segments were flat, as consumers tried to moderate their alcohol intake. However, there are also positive trends in the category.

Buyers reported that while people may be drinking less, they are drinking "better," meaning that while unit sales are off, sales of premium or higher-ticket alcoholic beverages like the more expensive vodkas, California varietal wines, or ultra premium and imported beers are all up.

Most buyers are reconfiguring planograms to give more space to hot categories and brands. Also, many chains are organizing their planograms by price point. For example, they're opening the beer aisle with ultra premiums, imports, and non-alcoholic beers.

In wine, there is less space for French, German and Italian wines this year and more for the California varietals.

In spirits, the trend is towards fewer bourbon and American-blended whiskies on the shelf and much more vodka, tequila, and rum. There is even a new category emerging, rum-based coolers, that may do for certain segments of distilled

**The top 10 beer brands**

| Rank | Brand | Segment | Market share 1988 | Market share 1989 | Percent change |
|---|---|---|---|---|---|
| 1. | Budweiser | Premium | 26.3% | 25.9% | (1.2%) |
| 2. | Miller Lite | Light | 10.3 | 10.5 | 3.1 |
| 3. | Bud Light | Light | 5.1 | 5.7 | 12.6 |
| 4. | Coors Light | Light | 4.9 | 5.6 | 15.4 |
| 5. | Busch | Popular | 4.6 | 4.8 | 5.8 |
| Total for top five | | | 51.1 | 52.6 | 3.2 |
| 6. | Miller High Life | Premium | 4.4 | 3.8 | (12.2) |
| 7. | Old Milwaukee | Popular | 3.7 | 3.6 | (2.9) |
| 8. | Milwaukee's Best | Popular | 3.2 | 3.6 | 13.3 |
| 9. | Coors | Premium | 3.4 | 2.7 | (20.3) |
| 10. | Miller Genuine Draft | Premium | 3.2 | 3.3 | 4.3 |
| Total for top 10† | | | 67.8 | 68.8 | 1.8 |

*†Excluding Classic, Dry and Dark* *Source: Impact Databank*

spirits what wine coolers did, for a while, for wine sales.

Spirits are definitely down, but there is growth in premium brands like Absolut vodka and Glen Fiddich scotch.

"People are willing to spend more money on a single package," said Dan Hale, who buys alcoholic beverages for Pontiac, Mich.-based Perry Drug. "Instead of a half gallon of Smirnoff, they're now buying a fifth of Absolut."

Most buyers said they don't see many more doors out there selling alcohol. It's the same-sized pie, it's just that moderation has reduced the frequency of consumption. This has also made many chains very sensitive to what they stock.

One store manager for K mart disclosed that his chain watches footage closely for this category and looks to merchandise by niche or area of opportunity. "We want to sell what's selling," he said, referring to being in stock on the hot vodkas or premium beers.

This year, most buyers said their strongest segment in spirits is vodka. Absolut is still very strong as are two relatively new items: Tanqueray's Sterling Vodka and Elduras from Icelander.

Tequila as a category is also doing very well, particularly Jose Cuervo Gold, and the recently introduced Cuervo 1800.

Schnapps is also still strong. Two brands doing well are Maui Tropical Schnapps and Blue Hawaii Schnapps. One buyer pointed out that these two brands weren't even in major distribution about a year ago, and now they're in the top 75 in some states.

**Growth brands in beer**

| Brand | % change (millions of barrels '89 vs. '88) | 1989 market share | Point change in market share ('89 vs. '88) |
|---|---|---|---|
| Miller Genuine Draft | 24.3% | 2.4% | 0.4 |
| Coors Light | 15.4 | 5.6 | 0.7 |
| Milwaukee's Best | 13.3 | 3.6 | 0.4 |
| Bud Light | 12.6 | 5.6 | 0.7 |
| Natural Light | 11.1 | 1.1 | 0.1 |
| Hamm's | 10.0 | 0.6 | 0.1 |
| Busch | 5.8 | 4.8 | 0.2 |
| Old Milwaukee Light | 5.0 | 1.1 | 0 |

*Source: Impact Databank*

Most drug chain buyers are taking about a 15 percent to 17 percent margin on spirits and turning it an average five to eight times a year. Discount store buyers are taking a 12 percent to 15 percent margin, on average, and turning it closer to 15 to 18 times a year.

Many drug chain buyers average 22 percent to 28 percent margins on wines and turn the category seven to nine times a year. Discounters take about the same margins, but turn twice as high because they have more traffic and sharper prices.

The growth areas are in the better wines, the chardonnays and cabernets, where margins can be as high as 30 percent.

This year blush wines are hot, as are value-priced whites like Glen Ellen, Fetzer, and Napa Ridge.

When chains advertise wine, they usually pick what seems hot, and right now that's still the white zins and the chardonnays.

This year more buyers report seeing growth in what some call "beverage wines."

Perry's Hale says a beverage wine is a "transitional wine" for people who are moving up from sweeter beverages or wine coolers and looking for some intermediate drink before they plunge into traditional white wines.

Riunite is rebounding, with sales of its sweet Lambrusco and Bianca particularly hot.

The wine cooler category, once the only real hot growth segment in wines, has definitely cooled. Now there are just two really major brands left: Bartle's and Seagram's. However, coming on strong is a new cooler idea: a rum-based cooler from Bicardi called Bicardi's Breezers, at a higher ticket than wine coolers. Many chains are retailing it at $5.99 per four-pack compared with $2.99 to $3.49 for wine coolers.

In moderate-priced wines, Kendall Jackson and Beringer are both doing well, particularly with their chardonnays and cabernets.

Robert Mondavi's cabernets also sell well and Sutter Home has one of the best price value zins, buyers said. In blush wines, Gallo's White Grenach is very popular as is Sebastini's white zin and Beringer's white zin.

### Sangria back on track

Sangria is also showing a resurgence, thanks probably to the trend towards beverage wines as well as Gallo's advertising.

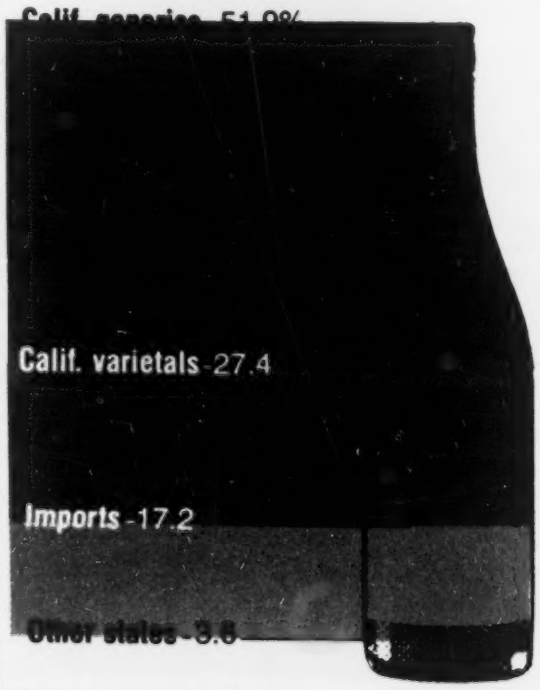
Boxed wines are also becoming more common; they are more economical than jug wines, and are portable with strong packaging. Franzia, out of California, seems to be the leader in this segment with its price value assortment of five-liter generic wines.

Since last year when two new non-alcoholic beers hit the market, this segment of the beer category has soared. Some chains reporting 25 percent to 40 percent growth. Both Sharp's and O'Doul's are selling well.

Sales of imported beers are still strong, led by Molson, Heineken and Lowenbrau, buyers said. In the Midwest, Labatt's and Molson's, both Canadian beers, are exceptionally popular.

In premium beers, Miller Genuine Draft is doing very well. Sales of Bud Light are very good, and the new Bud Dry is also selling well, according to buyers.

**1989 share of U.S. table wine market**




*Source: Impact Databank*

# TOP BRANDS

## Part II: Consumer Survey

# Discounters' Offerings Satisfy Consumers

**By Laura Liebeck**

When consumers head for their local discount store they have fewer specific name brands in mind, apparently because their needs can be satisfied within a typical discounter's broader assortments.

That is just one of several important observations gleaned from the 1990 Consumer Brands Survey, conducted in August for *Discount Store News* by Leo J. Shapiro & Associates, a Chicago-based market research firm.

The major trends affecting brand preference unearthed by the study include:

- Fewer consumers than last year are shopping with a specific brand preference;
- Consumers are increasingly more confident of finding the brands they want;
- Consumers are still slightly more likely to switch brands than skip a purchase;
- Consumer preference for private label merchandise is fairly low but above last year.

A chasm has grown between consumers and store managers concerning brand preference.

The two groups agree on fewer Top 10 brands this year than in 1989. Just 98 brands in 18 product categories are considered Top 10 performers by discount store managers and as preferred brands by discount store shoppers looking to make a purchase in those categories. A year ago, the two groups agreed on 110 Top 10 brands in 17 categories, up from 106 brands in 1988.

In addition, in six product categories, store managers and consumers agreed on fewer than five of the Top 10 brands. In 1989, the two groups agreed on at least five brands in each category.

Moreover, consumers and store managers agree on just seven No. 1 brands—Black & Decker, Kodak, Pennzoil, Conair, Cannon, Crest and Tide—compared with 10 last year. And in only four categories, toys, cosmetics, hardware and automotives, do the two groups agree on the top two brands, although in reverse order.

Despite all of that, consumers are increasingly more confident they will find what they are looking for at the local discounter, a result that translates directly into sales.

Obviously, the huge number of available brand name products satisfies more consumer needs than ever before while reducing their perceived need to stick to only a specific brand.

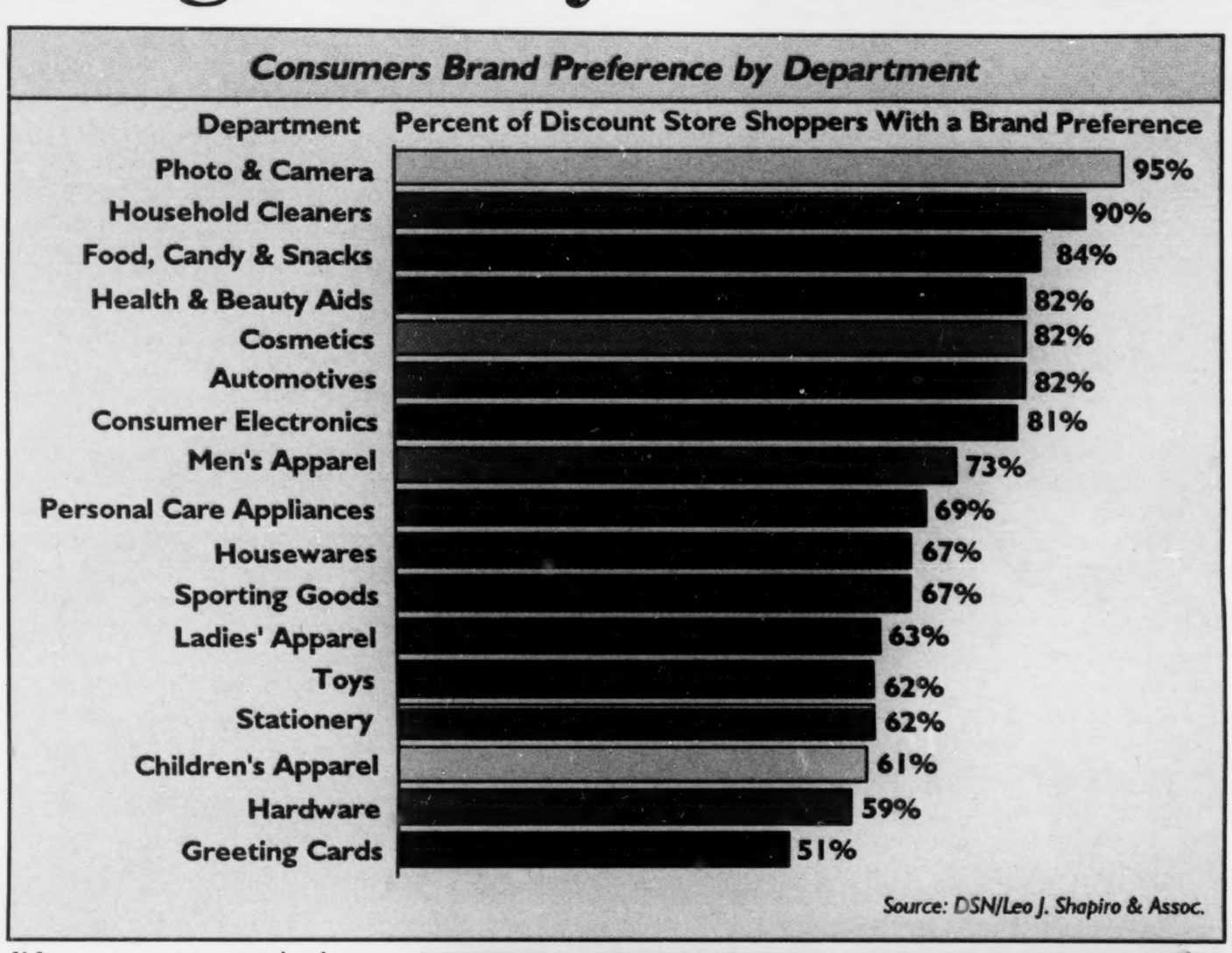
The Consumer Brands Survey is Part Two of *DSN*'s annual brands report. The first part of the survey, published in *DSN*'s Oct. 1 issue, reported store managers' assessment of their top performing brands in 18 merchandise categories. Their responses were based on various factors including product movement and profits.

The Consumer Brands Survey identifies the top brands in the same product categories as the managers' report but is based on the brands consumers said they look for most when shopping in a discount department store.

Because discount store shoppers also shop at other types of retail outlets, sometimes the brands they say they prefer are not mass market labels but brands found in department or specialty stores, or even factory outlets, proving that brand marketing crosses many lines.

According to the study, consumers are paying more attention to brands than they did a year ago, continuing a three-year trend. They report that they are more inclined to buy private label merchandise than they were last year, 43% vs. 38% in 1989.

*(Continued on page 23)*




### Agreement of Trade and Consumers
**Top Ten Brands: 1990**

| Department | Number of Brands Store Managers and Consumers Agree On* |
|---|---|
| Automotives | 8 |
| Cosmetics | 8 |
| Ladies' Apparel | 7 |
| Toys | 7 |
| Consumer Electronics | 7 |
| Personal Care Appliances | 7 |
| Food, Candy & Snacks | 6 |
| Hardware | 6 |
| Household Cleaners | 6 |
| Photo & Camera | 6 |
| Housewares | 5 |
| Men's Apparel | 5 |
| Sporting Goods | 4 |
| Stationery | 4 |
| Health & Beauty Aids | 4 |
| Greeting Cards | 3 |
| Children's Apparel | 2 |

**Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing name brands in [department]?' and discount store consumers' response to the question: 'If you were shopping for [product] in a discount department store, which brand of that product would you want?'*

*Source:* Discount Store News/*Leo J. Shapiro & Assoc.*

## Top Consumer Brands

***Automotives*** ..... ***41***
Pennzoil
Quaker State
Castrol/Castroil

***Children's Apparel*** ..... ***27***
Fruit of the Loom
Levi's
OshKosh

***Consumer Electronics*** ..... ***35***
Sony
General Electric
Nintendo

***Cosmetics*** ..... ***28***
Maybelline
Cover Girl
Revlon

***Food, Candy, Snacks*** ..... ***46***
Hershey's
M&M/Mars
Snickers

***Greeting Cards*** ..... ***45***
Hallmark
American Greetings
Ambassador

***Hardware*** ..... ***42***
Black & Decker
Stanley
General Electric

***Health & Beauty Aids*** ..... ***46***
Crest
Suave
Charmin

***Household Chemicals*** ..... ***35***
Tide
Clorox
Ajax

***Housewares*** ..... ***36***
Cannon
Black & Decker
Corning

***Ladies' Apparel*** ..... ***27***
Hanes
Levi's
Gitano

***Men's Apparel*** ..... ***28***
Levi's
Hanes
Fruit of the Loom

***Personal Care*** ..... ***36***
Conair
General Electric
Clairol

***Photo, Camera*** ..... ***38***
Kodak
Fuji
Polaroid

***Sporting Goods*** ..... ***41***
Wilson
Spalding
Rawlings

***Stationery*** ..... ***44***
Hallmark
Mead
BIC

***Toys*** ..... ***42***
Mattel
Fisher-Price
Tonka

*Discount store shoppers nationwide named their preferred brands in 17 merchandise categories, in a poll conducted for* Discount Store News *by Leo J. Shapiro & Associates.*

**TOP BRANDS** PART II

# Survey Shows Consumer Confidence Rises

By Laura Liebeck

Consumers are more certain than ever before that they will find exactly what they are looking for at their local discount store.

A very strong 51% of shoppers polled in *DSN*'s Consumer Brands Survey said they are absolutely certain they will find what they are looking for, up from 44% last year and in 1988.

Discounters are also gaining more ground with their private label brands, continuing last year's trend. Consumers of half the surveyed categories reported being more interested in private label goods compared to 1989, permitting discounters to save a sale in absence of a nationally recognized brand.

Shoppers appear most interested in private label merchandise in the three apparel categories where many discounters have concentrated much effort, plus stationery and hardware.

A growing preference for private label goods was recorded in health & beauty aids, housewares and sporting goods, each of which received at least double the response level they got in 1988.

Consumers still resist private label brands in consumer electronics, food, candy and snacks, cosmetics, household cleaners, photo and camera, and toys, intensely brand-oriented categories.

In CE, for example, preference for private label products decreased by more than half compared with 1989.

Despite discount store shoppers' increased certainty of finding exactly what they seek and their continued acceptance of private labels in numerous categories, shoppers also say that in absence of finding their preferred brand they would sooner skip a purchase than switch to another label in 11 of the 18 surveyed product categories. And when asked to rate their confidence of finding a preferred brand, shoppers gave a mean confidence rating lower than 1989's figure.

Overall, the large number of name brand products in all 18 merchandise categories gives consumers confidence that they will find the brand they seek.

On a scale of 1 to 9, with 1 meaning no confidence and 9 meaning total confidence, shopper responses produced a mean confidence rating of 7.30 this year, down from 7.37 in 1989 and 7.42 in 1988. But strangely, the number of people expressing total confidence increased, from 44% to 51%, suggesting discounters are satisfying more shopper needs than before.

The category recording the highest mean confidence rating this year is food, candy and snacks, 7.97, up from 7.80 in 1989. These consumers were also the most certain of finding their preferred brand. Fifty-eight percent gave the category a 9 on the 1-to-9 scale, meaning over half are certain of finding exactly what they seek.

Only customers of photo and camera produced a higher confidence percentage, 59%, but the mean rating eased slightly to 7.88 from 7.89 a year ago.

Other categories where consumers said they were more confident of finding their preferred name brand product this year compared to 1989 were household cleaners, cosmetics, children's apparel, domestics, automotives and CE.

Consumers were least confident of finding their preferred brands in women's apparel. Shoppers gave this category the lowest mean confidence rating in the survey, 6.64, down from 6.94 in 1989 and 6.99 in 1988. Just 33% of women's apparel shoppers reported being certain of finding exactly the brands they seek even though seven labels on their Top 10 list matched store managers' survey of top performers.

Women's apparel wasn't the only merchandise category to score a mean confidence rating below seven. The others include, in order: hardware, men's apparel, consumer electronics and sporting goods. These shoppers also reported being the most unsure of finding what they were looking for, recording "not sure" scores in excess of 20%. Other categories where consumers are unsure of finding their preferred brands include toys, stationery and personal care appliances.

Whether due to brand loyalty or uncertainty over finding a preferred brand, consumers report they would be slightly more willing to skip a purchase than change brands if they can't find a specific label.

This year, 48.2% of surveyed shoppers said they would skip the purchase if their preferred brand was unavailable, compared with 47.9% a year ago.

Cosmetics and CE shoppers are the most least likely to switch, with 65% and 63%, respectively, saying they would rather skip the purchase than change brands. Children's apparel, greeting cards and stationery shoppers are the most willing to switch brands.

**Consumer Snapshot:**

| The Top 5 Departments In Private Label Preference | The Bottom 5 Departments In Private Label Preference |
|---|---|
| Women's Apparel | Personal Care Appliances |
| Stationery | Consumer Electronics |
| Children's Apparel | Cosmetics |
| Hardware | Household Cleaners |
| Men's Apparel | Photo & Camera |

*Source:* DSN/Leo J. Shapiro & Assoc.

## *Sampling of Households: Basis of Survey Responses*

NEW YORK — *DSN*'s exclusive consumer brands survey was based on a national sample of 894 households in telephone interviews that alternated between the "man and woman of the household."

The survey consisted of 18 product categories, one more than a year ago but the same as the Top Brands Survey of store managers published in *DSN*'s Oct. 1 issue. The new category this year is greeting cards. This category was separated from stationery to better examine brand preferences in the two areas.

All of the research was conducted and compiled this summer by Leo J. Shapiro & Associates, a Chicago-based market research firm. Responses were from discount store shoppers only, people who shop discount stores at least three times a year.

Each respondent was asked if they had a brand preference in each category; what that preference was; whether they prefer private label goods; and how willing they would be to either skip a purchase or switch brands in absence of their preferred brand.

## Discounters Satisfy Consumers

*(Continued from page 19)*

Wal-Mart shoppers claim to be the most sensitive to branded goods, with 51.3% saying they pay more attention to brands than other people they know at the same stage of life. Ames shoppers seem to be the least interested, 42%.

Shoppers most interested in private label merchandise are found in greater abundance at Target. Forty-seven percent said they are more inclined to buy private label goods than other people they know, indicating the strength of Target's private label program.

The shoppers least interested in private label goods are found at Ames. One-third of Ames shoppers said they are more inclined to purchase private label merchandise than other people they know.

Overall, consumer preference for name brand products fell in 11 of the 18 merchandise categories surveyed this year. Only two were up, children's apparel and women's apparel. Brand preference in photo and camera, automotives, hardware and domestics remained even with last year's results. No comparison could be made in greetings cards, the 18th product category, since 1990 marks its entry on the survey.

In this year's survey, 474 brands were mentioned by consumers as labels they look for when shopping in discount stores. Seven out of 10 respondents said they shop with a brand in mind, down slightly from a year ago.

Kodak, Cannon and Hallmark received runaway first place spots in their respective categories, outpacing No. 2 by no less than a 4-to-1 margin.

Other top brands led their categories, albeit by thinner margins, include Cannon in domestics, Sony in consumer electronics, Pennzoil in automotives, Wilson in sporting goods, Levi's in men's apparel and Hanes in women's apparel. All these No. 1 brands received 20% or fewer mentions.

**How Consumer Preferences Affect Brand Trends in 17 Departments**

| Department | Mean Level Of Confidence Of Finding Brand* | Percent 'Not Sure'** | Preferred Private Label | Would Skip Purchase if Preferred Brand Was Unavailable |
|---|---|---|---|---|
| Food, Candy & Snacks | 7.97 | 8.7% | 8.1% | 39.0% |
| Photo & Camera | 7.88 | 11.7 | 7.0 | 50.6 |
| Household Cleaners | 7.88 | 10.6 | 5.7 | 52.7 |
| Automotives | 7.67 | 12.7 | 16.7 | 50.9 |
| Health & Beauty Aids | 7.64 | 16.6 | 16.6 | 45.0 |
| Cosmetics | 7.42 | 17.8 | 5.7 | 65.3 |
| Children's Apparel | 7.33 | 18.8 | 32.0 | 30.9 |
| Greeting Cards | 7.31 | 18.7 | 13.4 | NA |
| Toys | 7.27 | 21.2 | 8.7 | 58.3 |
| Housewares | 7.18 | 19.0 | 15.6 | 52.9 |
| Stationery | 7.14 | 19.5 | 34.7 | 33.5 |
| Personal Care Appliances | 7.02 | 22.4 | 13.3 | 48.3 |
| Sporting Goods | 6.96 | 24.2 | 12.8 | 55.2 |
| Consumer Electronics | 6.92 | 23.7 | 4.8 | 62.7 |
| Men's Apparel | 6.91 | 26.0 | 28.7 | 43.4 |
| Hardware | 6.88 | 22.0 | 31.8 | 53.4 |
| Ladies' Apparel | 6.64 | 27.3 | 35.0 | 53.2 |

**Consumers were asked how likely would they be able to find the brands they want in each department. Mean: Rating on scale of 1 to 9 with 9 meaning they were 'certain' of finding their preferred brand in a discount store.*
***Ratings of 1 to 5 are grouped together indicating 'Not Sure.'*
*NA — not available*

*Source:* Discount Store News/Leo J. Shapiro & Assoc.

# Hanes Leads Way With Ladies' Wear Shoppers

Consumers ranked Hanes first in the Top Brands Survey in ladies' apparel, greatly at odds with the perception of store managers, who gave Gitano top honors by a wide margin.

Gitano was only third on the consumers' list, following Levi's at No. 2.

This is a very different story than presented by store managers in the earlier survey. There, Gitano seemed to be king, far outpacing any other label. Though Gitano did lead the consumer survey in 1989, it did not hold on to the lead this year.

Hanes captured first place this time, rising from 6th place last year. At the retail level, this was the first year that store managers named Hanes to their Top 10 list. At No. 4 on the managers' survey, Hanes was one of the fastest risers on the list, perhaps explaining its success with consumers.

Levi's may also surprise a few managers. It ranks No. 2 on the consumer survey, compared with No. 11 on the managers' list.

**Top Ladies' Apparel: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Gitano | Hanes |
| Lee | Levi's |
| Chic | Gitano |
| Hanes | Fruit of the Loom |
| Jaclyn Smith | Lee |
| Bobbie Brooks | L'eggs |
| Wrangler | Calvin Klein |
| Fruit of the Loom | Chic |
| Bonjour | Jaclyn Smith |
| Jordache | Bobbie Brooks |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

The remaining Top 10 brands named by consumers are Fruit of the Loom, Lee, L'eggs, Calvin Klein, Chic, Jaclyn Smith and Bobbie Brooks.

Despite the differences at the top, consumers managed to name seven out of the 10 brands mentioned by store managers.

In addition to Levi's, L'eggs (7th) and Calvin Klein (8th) made the consumers' Top 10, but were ranked much lower on the store managers' list.

The survey brought to light how other brands were seen differently at the consumer level vs. retail management.

For instance, consumers ranked Fruit of the Loom fourth, but managers ranked it eighth. Interestingly enough, Fruit of the Loom ranked first by consumers most often shopping at Ames. Brand mentions by K mart, Wal-Mart and Target customers were more consistent with the overall list.

Lee was named fifth by consumers compared with second by managers. Chic was only eighth on consumers' minds, but third where managers were concerned.

Finally, two of the largest in-store brand names, Jaclyn Smith for K mart and Bobbie Brooks for Wal-Mart, rounded out the list. Managers had ranked them fifth and sixth.

Conversely, three brands that showed up in managers' Top 10 did not fare as well with consumers. These were Wrangler (11th), Jordache (13th) and Bonjour (17th). In the managers' study, these came in seventh, ninth and 10th, respectively.

**Consumer Brand Preferences In Ladies' Apparel**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Hanes | 13% | 14% | 14% | 13% | 10% |
| Levi | 8 | 9 | 10 | 12 | 11 |
| Gitano | 7 | 7 | 4 | 0 | 12 |
| Fruit of the Loom | 6 | 7 | 8 | 4 | 12 |
| Lee | 6 | 5 | 5 | 8 | 3 |
| L'eggs | 5 | 5 | 6 | 2 | 2 |
| Calvin Klein | 5 | 4 | 6 | 3 | 12 |
| Chic | 4 | 5 | 5 | 9 | 3 |
| Bobbie Brooks | 4 | 4 | 3 | 4 | 8 |
| Jaclyn Smith | 4 | 5 | 4 | 0 | 6 |

*Source: DSN/Leo J. Shapiro & Assoc.*

Only 33% of the consumers queried in this year's survey said they would be likely to find their preferred brand at the discount store they shopped most often. This is down from 37% last year.

At the same time, respondents seemed flexible and said they would be willing to switch brands if their first choice was not available. Of all those asked, 47% said they would switch to another brand rather than skip the purchase.

When asked if they were sensitive to brand names, 49% of surveyed shoppers said they pay more attention to brands. This is an increase of only one percentage point from last year—surprising in light of the brand-conscious fervor being experienced by store managers and buyers.

Consumers are also seemingly more comfortable with private label lines. The number of respondents that are more inclined to choose a private label line increased a full five percentage points from those surveyed last year.

# Consumers, Managers Differ On Kids' Brands

The children's apparel category showed the greatest disparity between consumers and store managers brand perception, according to *DSN*'s Top Brands Survey. Only two of the top 10 mentions by managers made the consumers' Top 10 list.

The results are not all that surprising, however. The percentage points separating the leaders in the store managers survey were so slight that any shift would have made it possible to unseat the leaders. The race in the consumers' study is just as close.

Fruit of the Loom got the top honors in the consumers' list for children's apparel, followed by Levi's, OshKosh, Carter, Hanes, Health-Tex, Reebok, Nike, Garanimals and Buster Brown. Less than one percentage point separated the top three in the group.

One interesting occurrence is that Fisher-Price, which led the managers' list, was not among the total of 25 brands mentioned by consumers. The brand was missing despite the fact that it was ranked or was at least tied for No. 1 by store managers at Wal-Mart, K mart and Target.

Only OshKosh, which was seventh in the managers' ranking, and Garanimals, which was ninth on the two lists, made the Top 10 in both surveys.

The rest of the Top 10 brands mentioned by consumers were also mentioned by managers, though they appeared lower on the managers' list.

Buster Brown showed the largest discrepancy between the two studies. It was ranked 10th by consumers, but was down at No. 23 at the store manager level.

Two of the brands mentioned for the second year in a row by consumers were not mentioned by managers at all. These were Reebok and Nike, names popular with shoppers, but not usually available by discounters.

It should be noted that though managers may not have mentioned a label because of its association as a department store brand (Nike, Reebok and Buster Brown, for instance) discount store shoppers may have access to it through their shopping at other retail outlets.

While Gitano managed to place third its first time out on the managers' list, consumers only ranked it 16th.

Of all apparel categories, more respondents said they were likely to find their preferred children's apparel brand at the discounter they shopped most often.

This may seem strange considering the differences in what managers and consumers perceive as the best-selling brands. Apparently, in this category especially, having a variety of national brands is what counts most. Sixty-nine percent said they would switch brands if their first choice was not available.

**Consumer Brand Preferences In Children's Apparel**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Fruit of the Loom | 10% | 12% | 12% | 7% | 18% |
| Levi's | 9 | 8 | 7 | 8 | 6 |
| OshKosh | 9 | 10 | 8 | 8 | 13 |
| Carter | 7 | 7 | 6 | 7 | 4 |
| Hanes | 6 | 7 | 8 | 5 | 0 |
| Health-Tex | 5 | 6 | 5 | 4 | 9 |
| Reebok | 5 | 5 | 5 | 6 | 3 |
| Nike | 4 | 4 | 6 | 6 | 5 |
| Garanimals | 3 | 2 | 6 | 1 | 2 |
| Buster Brown | 3 | 4 | 5 | 1 | 5 |

*Source: DSN/Leo J. Shapiro & Assoc.*

**Top Children's Apparel Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Fisher-Price | Fruit of the Loom |
| Lee | Levi's |
| Gitano | OshKosh |
| Liberty | Carter |
| Wrangler | Hanes |
| Gerber | Health-Tex |
| OshKosh | Reebok |
| Curity | Nike |
| Garanimals | Garanimals |
| Spencer's | Buster Brown |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

# Shoppers: Men's Brands Lacking at Discounters

Men's apparel shoppers are among the least confident about finding the name brands they seek at discount stores, according to results of *DSN*'s Consumer Brands Survey.

However, they are also among the shoppers most willing to switch to an alternative brand if their first choice is unavailable.

While agreeing with store manager's that Levi's is the No. 1 men's apparel label, the two groups only matched opinions on three other top 10 brands. This result is probably closely linked with consumers' lack of confidence in finding specific brands at their local discount store.

Only 37% of the respondents said they were likely to find their preferred men's apparel brands in the discount stores they shop, the same percentage as last year.

But men's apparel shoppers appear open-minded. Fifty-seven percent of those queried said they would switch brands if their first choice was not available.

On the other hand, those surveyed were adamant that their choices be limited to national brands. Seventy-one percent of the respondents said "no" to private label men's apparel. This was the only apparel category to receive such a negative response to private label merchandise.

**Top Men's Apparel Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Fruit of the Loom | Levi's |
| Wrangler | Hanes |
| Hanes | Fruit of the Loom |
| Lee | Lee |
| Levi's | Arrow |
| Gitano | BVD |
| Brittania | Haggar |
| Rustler | Jockey |
| McGregor | Calvin Klein |
| Dickies | Dickies |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

For the second consecutive year, Levi's was the leading brand in men's apparel. Hanes and Fruit of the Loom were ranked Nos. 2 and 3, reversing last year's results.

The top three brands overall were reshuffled slightly at individual stores, but with the same brand deck of cards.

The only retailer to march to a slightly different drummer was Ames which ranked Fruit of the Loom first, Levi's second and Arrow third.

On the overall consumers' list, the remaining brands in the top 10 are Lee, Arrow, BVD, Hagger, Jockey, Calvin Klein and Dickies.

Only five of the brands mentioned in the earlier store managers survey made the grade with consumers, though the leaders were the same. Managers had named Fruit of the Loom first, Wrangler second and Hanes third.

**Consumer Brand Preferences in Men's Apparel**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Levi's | 20% | 22% | 12% | 25% | 19% |
| Hanes | 15 | 18 | 15 | 21 | 7 |
| Fruit of the Loom | 14 | 13 | 13 | 7 | 22 |
| Lee | 6 | 6 | 5 | 2 | 5 |
| Arrow | 6 | 5 | 7 | 4 | 10 |
| BVD | 3 | 4 | 4 | 4 | 2 |
| Haggar | 3 | 3 | 4 | 2 | 5 |
| Jockey | 2 | 2 | 4 | 4 | 3 |
| Calvin Klein | 2 | 2 | 1 | 3 | 4 |
| Dickies | 2 | 3 | 2 | 2 | 0 |

*Source: DSN/Leo J. Shapiro & Assoc.*

The most noticeable absence in the consumers' list was Wrangler, which was No. 5 in 1989. Though more than four in 10 store managers mentioned it as a top performer—ranking it second—it dropped to 11th on the consumers' list. Wrangler's placement by consumers is also surprising because the brand actually ranked first among K mart managers this year.

Gitano and Brittania also made poor showings. Though Nos. 6 and 7 on the manager's list, neither was among the total of 23 brands mentioned by consumers. Interestingly enough, Brittania was mentioned as the leading men's apparel brand among Target shoppers.

By the same token, Jockey (8th) and Calvin Klein (9th) were not mentioned at all in the managers' study.

Also slipping on the consumers' list was Rustler (13th) which was 8th according to store managers. McGregor (12th) also missed the Top 10 with consumers, but was ninth among managers. McGregor placed eighth with consumers in last year's survey.

# Consumers, Managers Agree on Top Cosmetics

Consumers agreed with store managers on seven out of 10 top brands in the cosmetics category, reinforcing store managers' beliefs that they are on top of the latest trends.

In the first part of *DSN*'s Top Brands Survey, managers said cosmetics was one of the areas they felt they had the most influence over.

In the consumer portion of the survey, five brands matched the ranking set by store managers, except for one change in the No. 4 position: Avon.

Cover Girl led the consumer list, with Maybelline and Revlon following. Managers had named Maybelline first, but it and Cover Girl have been flip-flopping over first place for a number of years.

The two also flip-flopped when compared at individual stores. Shoppers at K mart and Wal-Mart showed a preference for Cover Girl, while Target and Ames customers mentioned Maybelline most often.

Cover Girl and Maybelline were each mentioned by four in 10 of the consumers surveyed. Revlon was metioned by just under two in 10 consumers.

The top three were definitive winners garnering the largest share of mentions. The remainder of the brands in the Top 10 fell way short of unseating the top three. They were also very close in terms of percentage points.

Rounding out the Top 10 cosmetics brands on the consumers list were Avon, Max Factor, L'Oreal, Clarion, Aziza, Sally Hansen and Noxell.

Avon had a high recognition factor among consumers and was mentioned often enough to rank 4th on the list. This is despite the fact that the brand is only available through door-to-door catalog sales.

Consumers did manage to pull some other surprises. Clairol showed the biggest decline as far as consumers were concerned. Though it made 6th place in the managers survey, the brand wasn't even mentioned by consumers as a brand they shop for in cosmetics. Clairol had ranked ninth among consumers in 1989. Almay, 10th in the managers' survey, was 12th on the consumers' list this year.

Consumers also ranked Aziza eighth, while managers had it further down at 11th.

Consumers named a total of 17 cosmetics brands. Three of these were not mentioned by managers at all: Faberge (an Avon division); Tip Top and Wet 'n' Wild.

For both consumers and managers, Sally Hansen and Noxell both showed impressive gains over last year.

Whichever brand they mentioned, consumer responses indicated they remained loyal to their choice and sure about the retail stores they shop.

According to respondents, 52% said they were confident of finding the brand they wanted in the discount store shopped most often. This is truly a vote of confidence. In 1989, only 45% of respondents said they expected to find their favorite brand.

The survey also showed that only 35% of those buying a cosmetic brand would switch if their preferred product wasn't available, the lowest switch rate of any department.

**Top Cosmetics Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Maybelline | Cover Girl |
| Cover Girl | Maybelline |
| Revlon | Revlon |
| Max Factor | Avon |
| L'Oreal | Max Factor |
| Clairol | L'Oreal |
| Noxell | Clarion |
| Sally Hansen | Aziza |
| Clarion | Sally Hansen |
| Almay | Noxell |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

**Consumer Brand Preferences In Cosmetics**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Cover Girl | 25% | 25% | 26% | 24% | 17% |
| Maybelline | 25 | 22 | 26 | 25 | 35 |
| Revlon | 15 | 16 | 14 | 21 | 15 |
| Avon | 5 | 5 | 4 | 7 | 9 |
| Max Factor | 5 | 6 | 4 | 4 | 5 |
| Loreal | 5 | 4 | 1 | 7 | 9 |
| Clarion | 3 | 3 | 4 | 0 | 4 |
| Aziza | 3 | 3 | 2 | 4 | 0 |
| Sally Hansen | 2 | 2 | 4 | 3 | 9 |
| Noxell | 2 | 2 | 0 | 2 | 3 |

*Source: DSN/Leo J. Shapiro & Assoc.*

# Brands Inspire Loyalty in Household Cleaners

More consumers than ever before would rather skip a purchase entirely than buy an alternative household cleaner or chemical.

But it doesn't seem they have to do that.

Consumers who frequent discount stores said they usually find the household cleaner they're looking for, according to results of *DSN*'s 1990 Consumer Brands Survey.

In fact, this year consumers are more confident they will find the cleaning product brand they are looking for than they were last year.

On a scale of 1 to 9—with 1 meaning no confidence and 9 meaning total confidence—shoppers gave household cleaners a 7.88 confidence rating, higher than for every category but photo and camera, and food, candy & snacks, and bettering last year's 7.66 mean confidence rating. In addition, 57% of the surveyed shoppers gave the category a "9" (the top score) on the confidence scale, an increase from 53% a year ago.

This is an impressive result considering consumers listed 37 brands of household cleaners, more than any other category except housewares, sporting goods, and health & beauty aids. Obviously, consumers are confident that discount stores have a complete selection of name brand cleaning products and they will find what they need at those outlets.

Household cleaners is a very brand-oriented category, more so than any other category except photo and camera. Ninety percent of those consumers looking for household cleaners said they shop a discount store with a specific brand in mind. This is down slightly from 1989 when 95% of consumers said they shop for a particular label.

Very few consumers (6%) express any interest in private label household cleaners, and 53% said if they didn't find the brand they wanted, they would skip the purchase rather than switch to a different brand. A year ago, 48% of shoppers said they would skip the purchase.

The brand most sought after is Tide, the No. 1 cleaner on both the consumer and store manager brands list for five years running.

Tide's dominance as the No. 1 brand in household cleaners and chemicals is so entrenched that it is preferred by discount store consumers nearly 3-to-1 over No. 2 Comet. But Comet wasn't even mentioned by store managers as a Top 10 performing brand in the managers survey.

Overall, managers and consumers agreed on six of the Top 10 cleaners brands. After Tide in the lead position, the two groups didn't agree on the ranking of the top brands.

Among discount store consumers, Tide and Comet were in the top two spots followed closely by Ajax in third, Clorox in fourth, Windex (No. 5), Dawn (No. 6), and Pine-Sol, Cheer, Lysol and Ivory all tied for seventh.

For the past several years, Comet, Ajax, and Pine-Sol made the Top 10 consumers list but have not made the Top 10 list in the minds of store managers.

Generally, the Top 10 cleaners were the same at all four discount chains, just in different order. The exceptions were Tide, always No. 1, and Pledge, 11th overall but No. 5 at Ames.

**Consumer Brand Preferences In Household Cleaners**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Tide | 29% | 27% | 33% | 25% | 42% |
| Comet | 12 | 9 | 13 | 13 | 14 |
| Ajax | 10 | 9 | 6 | 12 | 3 |
| Clorox | 9 | 10 | 11 | 10 | 8 |
| Windex | 8 | 9 | 7 | 5 | 8 |
| Dawn | 7 | 7 | 9 | 8 | 11 |
| Pine-Sol | 6 | 8 | 6 | 11 | 6 |
| Cheer | 6 | 7 | 9 | 10 | 9 |
| Lysol | 6 | 7 | 7 | 4 | 6 |
| Ivory | 6 | 6 | 7 | 8 | 9 |

Source: DSN/Leo J. Shapiro & Assoc.

**Top Household Cleaner Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Tide | Tide |
| Clorox | Comet |
| Windex | Ajax |
| Procter & Gamble | Clorox |
| Purex | Windex |
| Lysol | Dawn |
| Dawn | Pine-Sol |
| Formula 409 | Cheer |
| Fantastic | Lysol |
| Comet | Ivory |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

Source: DSN/Leo J. Shapiro & Assoc.

# Consumers Embrace Wide Array of CE Brands

For the second year in a row, Sony beat out GE as the most desired brand name in consumer electronics among discount store shoppers, but both brands slipped slightly from 1989.

By far the No. 1 brand with consumers, Sony's performance was strongest among Ames shoppers. Nearly three of 10 consumers mentioned the popular CE brand as a product they look to purchase.

GE was second at Ames with one in 20 mentions, about the same mention rate Sony received at K mart, Wal-Mart and Target.

However, when it comes to CE products, Wal-Mart shoppers appear to be the most brand-conscious of all. Eighty-five percent of them said they have a brand preference when shopping for CE products.

Overall, CE shoppers were among the most brand-loyal in the discount marketplace. Two-thirds said that if a store didn't have their preferred brands, they would skip the purchase rather than buy another label.

In addition, only 5% expressed any interest in private label CE equipment, lower than all other categories except personal care appliances.

Despite these results, discounters seem to be missing many sales opportunities. Fully one-quarter of CE shoppers said they were "unsure" of finding their preferred brands in their local discount store. Only sporting goods, and men's and women's apparel shoppers exhibited less certainty.

Despite CE shoppers' strong preferences for brand names, No. 1 Sony only claimed a mention rate of 15% to secure the top spot on the Consumer Brands Survey. By contrast, Kodak, Cannon and Hallmark all swept their respective categories with well over 50% of mentions. Others, like Mattel, Fisher-Price, Cover Girl and Levi's, scored between 20% and 30%.

The biggest gainers this year were all new to the chart. Magnavox, Sanyo, AT&T and Memorex, which all scored mention rates of about one in 20 consumers, good enough for fifth through eighth place, respectively. The four brands were so close that they formed a virtual four-way tie for fifth.

RCA and Panasonic lost enough ground to allow Nintendo, which held steady at about one-tenth of mentions, to slip past them from fifth place to finish third this year. Panasonic slipped to fourth from third, and RCA dropped from fourth to fifth. Pioneer, which held steady in mention rates, nevertheless slipped from ninth to 10th place.

Sharp, Emerson, Zenith and Scotch/3M all dropped off the Top 10 entirely.

Discount store managers seemed to be well on top of consumer preferences. With the exception of Emerson, Sharp and GoldStar, the managers' list of top-performing brands was very similar to the consumers' list. Those three brands are heavily skewed toward discount needs, offering advanced features at very reasonable prices. As such, they probably perform far better on the sales floor, where they can be compared to more expensive competitors directly, than in a less concrete preference poll.

**Consumer Brand Preferences In Consumer Electronics**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Sony | 15% | 17% | 15% | 14% | 28% |
| GE | 9 | 11 | 3 | 10 | 16 |
| Nintendo | 9 | 8 | 8 | 9 | 7 |
| Panasonic | 7 | 6 | 1 | 5 | 10 |
| RCA | 7 | 4 | 4 | 10 | 3 |
| Magnavox | 5 | 5 | 8 | 10 | 2 |
| Sanyo | 5 | 5 | 2 | 2 | 6 |
| AT&T | 5 | 4 | 10 | 6 | 6 |
| Memorex | 5 | 5 | 7 | 6 | 0 |
| Pioneer | 4 | 4 | 4 | 9 | 3 |

Source: DSN/Leo J. Shapiro & Assoc.

**Top Consumer Electronics Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| General Electric | Sony |
| RCA | General Electric |
| Emerson | Nintendo |
| Panasonic | Panasonic |
| Magnavox | RCA |
| Sony | Magnavox |
| Sanyo | Sanyo |
| Nintendo | AT&T |
| Sharp | Memorex |
| GoldStar | Pioneer |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

Source: DSN/Leo J. Shapiro & Assoc.

**HOME PRODUCTS**

**TOP BRANDS: PART II**

# Product Lines Blur in Housewares Category

Cannon, the No. 1 name in domestics among consumers, and Ajax, No. 3 in household cleaners, took the top spot and seventh position, respectively, in housewares this year. Possibly, discounter efforts to create unified home products departments are causing consumers to think of housewares, household cleaners and domestics as one category.

And that seems to be causing a lot of confusion. The venerable Rubbermaid label, No. 1 on the 1988 and 1989 *DSN*'s Consumer Brands Surveys and a housewares powerhouse, fell to fifth this year, just three percentage points behind Cannon.

Like many categories, the Top 10 list in housewares was composed of brands with response levels so close to one another that a small change in responses could have produced a completely different list. Only seven percentage points separated the No. 1 from the No. 10 brand, and none of them seemed to have carved out a clear endorsement from consumers.

Cannon was named a preferred housewares label by just one in 10 consumers. Black & Decker, Corning and General Electric all tied for second place with 9%. Rubbermaid received 7% of consumer mentions as a preferred brand followed by Mr. Coffee, Ajax, Corelle and Silverstone all tied with 4% and Sunbeam was 10th with 3%.

Cannon's first place showing was due mostly to Ames customers. Nearly one in seven Ames consumers said they look for Cannon when purchasing housewares products.

General Electric was the No. 1 brand cited by Wal-Mart customers even though five years ago GE sold its housewares/small electrics division to Black & Decker. Apparently, the GE name is so well entrenched that even years after the label disappeared from the shelves, customers still identify with it. (GE was fourth at K mart and sixth at Target and Ames). Corning was a close second among Wal-Mart shoppers.

Corning was first among Target housewares customers with B&D a close second.

K mart shoppers put Cannon in first place with slightly less than one in 10 naming the domestics label, followed very closely by Corning in second.

The weak endorsement of the Top 10 housewares labels may be attributed to the huge number of brands mentioned, 39, which diluted the responses. Only two other merchandise categories received more brand mentions: sporting goods (42) and H&BA (62).

The large selection of merchandise has not substantially affected how certain consumers are about finding their preferred brands at their local discount store. However, the overall mean confidence rating is off from last year.

On a scale of 1 to 9, housewares shoppers gave the category a relatively low mean 7.18 confidence rating, down from 7.30 in 1989 and 7.57 in 1988. One-third of consumers report they are certain—a 9 on the scale—they will find what they seek.

**Top Housewares Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Rubbermaid | Cannon |
| Corelle | Black & Decker |
| Corning | Corning |
| Black & Decker | General Electric |
| Visions | Rubbermaid |
| Sterilite | Mr. Coffee |
| Purex | Ajax |
| Mr. Coffee | Corelle |
| Mirro | Silverstone |
| Proctor-Silex | Sunbeam |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

**Consumer Brand Preference In Housewares**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Cannon | 10% | 10% | 10% | 9% | 14% |
| Black & Decker | 9 | 8 | 10 | 10 | 14 |
| Corning | 9 | 10 | 10 | 11 | 10 |
| GE | 9 | 8 | 10 | 5 | 10 |
| Rubbermaid | 7 | 8 | 7 | 5 | 10 |
| Mr. Coffee | 5 | 5 | 5 | 3 | 12 |
| Ajax | 4 | 3 | 2 | 5 | 2 |
| Correll | 4 | 4 | 5 | 1 | 6 |
| Silverstone | 4 | 4 | 2 | 5 | 4 |
| Sunbeam | 3 | 4 | 3 | 5 | 2 |

*Source: DSN/Leo J. Shapiro & Assoc.*

# Conair Is No. 1 Again in Personal Care

Personal care appliance shoppers are the least certain of discount store customers about finding the specific brand they want at their local discount store.

And, for the second year in a row, Conair appliances were the most coveted by discount store shoppers.

Just 29% of shoppers surveyed in *DSN*'s Consumer Brands Survey said they are certain of finding the personal care appliance label they seek, down from 38% a year ago.

On a scale of 1 to 9 with 1 meaning no confidence and 9 meaning total confidence, shoppers gave personal care appliances a mean confidence score of 7.02, down from 7.40 last year and 7.46 in 1988.

Also, 48% of all personal care appliance shoppers said they would rather skip a purchase than switch brands, up from 45% who said that in 1989.

Private label isn't a viable alternative for many customers in this highly brand-oriented category.

Just 13% of consumers expressed a preference for private label personal care appliances, the highest of which were Wal-Mart shoppers, 17%. Ames shoppers, 9%, were least interested in private label.

Overall, shoppers are slightly less brand-conscious this year than they were in 1989. Of the consumers polled, 69% said they do have a brand preference when shopping for personal care appliances, the same level as 1988. Last year, brand preference in this category rose to 73%.

The most brand-conscious personal care appliance shoppers are found at Target, 77%. These shoppers, like consumers at the other three chains, said they prefer Conair-brand personal care appliances.

For the third consecutive year, Conair was mentioned as the preferred brand in this category. Conair was also named the top performer in the department by store managers.

One-fifth of all respondents said they preferred Conair personal care appliances, about the same response by K mart and Wal-Mart shoppers. Slightly more than one-fourth the customers at Ames and Target said they prefer Conair.

No. 3 Clairol, which fell from No. 1 in 1988 to four last year, recovered due to strong responses at K mart and Wal-Mart, and a revised ad plan that re-emphasized the Clairol label.

**Consumer Brand Preferences In Personal Care Appliances**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Conair | 21% | 22% | 20% | 26% | 28% |
| GE | 12 | 14 | 7 | 2 | 19 |
| Clairol | 11 | 12 | 13 | 4 | 9 |
| Gillette | 5 | 4 | 3 | 7 | 4 |
| Norelco | 4 | 4 | 7 | 4 | 7 |
| Braun | 4 | 3 | 5 | 2 | 4 |
| Black & Decker | 4 | 4 | 0 | 4 | 0 |
| Remington | 3 | 4 | 1 | 4 | 4 |
| Schick | 3 | 2 | 2 | 0 | 4 |
| Vidal Sassoon | 3 | 1 | 4 | 3 | 0 |

*Source: DSN/Leo J. Shapiro & Assoc.*

**Top Personal Care Appliance Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Conair | Conair |
| Norelco | General Electric |
| Remington | Clairol |
| Clairol | Gillette |
| Vidal Sassoon | Norelco |
| Windmere | Braun |
| Jheri-Redding | Black & Decker |
| Black & Decker | Remington |
| Sunbeam | Schick |
| General Electric | Vidal Sassoon |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

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# Brand-Conscious Photo Shoppers Focus on Kodak

Kodak held onto its top rating among discount store shoppers with a convincing three-fourths of all mentions as their preferred brand.

Its closest rival was No. 2 Fuji with only one in 10 consumers saying they seek out that brand, according to results of *DSN*'s 1990 Consumer Brands Survey.

But despite Kodak's solid hold on the top spot, shoppers reported being as likely to switch brands as skip the purchase if their preferred brand was not available.

According to survey results, 93% of surveyed shoppers said they have a specific brand in mind when shopping for photo and camera supplies. However, if that brand is not available to them, 49% said they would switch, up from 43% a year ago.

On the other hand, nearly six of 10 consumers said that they were "certain" of finding their preferred brand in discount stores, easily the highest such rating of all discount departments. (Only food, candy & snacks, cosmetics, household cleaners, and H&BA had a 50% or better rating.)

While Kodak's No. 1 spot seems fairly secure, its rate of mention, along with virtually every brand on the Top 10 slipped slightly from last year. After No. 2 Fuji no other, brand received as much as 5% of mentions.

For example, Polaroid saw its mention rate drop from 6% to 4%, but its ranking improved from fourth to third this year. Duracell, third in 1989, slipped to No. 7 this year, and Canon moved up a notch, to No. 4.

Eveready continued a three-year climb, this year reaching No. 5. However, its rate of mentions among shoppers declined slightly, from 4% to 3%. Scotch/3M moved up from ninth to sixth, and newcomers GE and Panasonic finished eighth and ninth, respectively. Memorex held on

*(Continued on page 52)*

**Top Photo & Camera Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Kodak | Kodak |
| Canon | Fuji |
| Polaroid | Polaroid |
| Minolta | Canon |
| Fuji | Eveready |
| Pentax | Scotch/3M |
| Nikon | Duracell |
| Scotch/3M | General Electric |
| Vivitar | Panasonic |
| Duracell | Memorex |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

**Consumer Brand Preferences In Photo & Camera**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| **Kodak** | 77% | 76% | 78% | 79% | 72% |
| **Fuji** | 9 | 9 | 5 | 9 | 8 |
| **Polaroid** | 4 | 3 | 3 | 5 | 2 |
| **Canon** | 3 | 4 | 5 | 5 | 2 |
| **Eveready** | 3 | 4 | 5 | 3 | 4 |
| **GE** | 2 | 2 | 2 | 4 | 6 |
| **Scotch** | 2 | 2 | 2 | 2 | 0 |
| **Duracell** | 2 | 2 | 2 | 3 | 2 |
| **Panasonic** | 2 | 1 | 0 | 0 | 3 |
| **Minolta** | 1 | 1 | 2 | 1 | 3 |

*Source: DSN/Leo J. Shapiro & Assoc.*

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TO: OUR MANUFACTURERS AND SUPPLIERS

STATEMENT OF POLICY CONCERNING GIFTS

We are taking this opportunity to restate our policy concerning gift-giving, not only during the forthcoming holiday season, but at all times of the year, on any occasion. Gifts, no matter how well intentioned by the donor, tend to shake the moral structure of the firmest business foundations by substituting subjective emotions and motives for objective judgment based on service, quality and price.

Accordingly for the mutual protection of our suppliers, our employees and the Company, we prohibit our employees from accepting gifts, gratuities, payments or favors of any kind. Any gifts received by our employees will be returned to the donor or donated to charitable organizations. Our employees are advised that violation of this policy is considered to be a grievous matter.

We call upon you to assist us and our employees by refraining from giving or offering such gifts. Your awareness of and cooperation with this policy will foster the continuation of fair business practices that favor our close association.

Best wishes for a happy, healthy, holiday season and a prosperous New Year.

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President and
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# Brand Preference Slackens in Sporting Goods

Sporting goods consumers are less confident than ever about finding particular sporting goods brands at their local discount department store. They also are slightly more apt to skip a purchase entirely than buy another brand if they don't find what they are looking for.

*DSN*'s 1990 Consumer Brands Survey found that only about one out of three discount store shoppers said they were sure they would find the brands they wanted, down from four out of 10 in the 1989 survey. Shoppers expressed less confidence in finding specific brands in only four other departments.

At the same time, the number of shoppers who said they would skip the purchase rather than switch brands increased slightly, from 53% in 1989 to 55% this year.

Oddly enough, sporting goods shoppers expressed a rather mild endorsement of brand name products.

Just 67% of the survey respondents said they shop for sporting goods with specific brands in mind, down from 71% a year ago. This result puts sporting goods in the middle of the pack: consumers expressed greater brand preferences in nine merchandise categories and fewer brand preferences in eight.

**Consumer Brand Preferences In Sporting Goods**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| **Wilson** | 17% | 17% | 17% | 18% | 10% |
| **Spalding** | 12 | 12 | 9 | 16 | 11 |
| **Rawlings** | 7 | 7 | 8 | 9 | 8 |
| **Coleman** | 5 | 4 | 4 | 3 | 7 |
| **Adidas** | 4 | 4 | 6 | 4 | 2 |
| **Daiwa** | 3 | 4 | 3 | 1 | 2 |
| **Zebco** | 3 | 2 | 4 | 1 | 3 |
| **Penn** | 3 | 4 | 3 | 5 | 1 |
| **Nike** | 3 | 2 | 2 | 2 | 5 |
| **Remington** | 3 | 2 | 4 | 1 | 0 |

*Source: DSN/Leo J. Shapiro & Assoc.*

Private label goods aren't high on their list either. Only slightly more than one in 10 expressed a preference for private label sporting goods, up two percentage points from a year ago.

Adding to the hazy picture is the fact that consumers and store managers matched up just four of the Top 10 brands. They were Wilson, Spalding, Coleman and Zebco.

The two groups didn't even agree on the top two sporting goods labels.

Frequent discount store shoppers put Wilson and Spalding at the top of their sporting goods list for the third year in a row, according to survey results. Managers named Coleman first and Wilson second. Zebco was third for managers, seventh for consumers, and Spalding was fourth for managers, second with consumers.

And although discount store shoppers consider Nike (No. 9) a preferred brand, managers who know Nike won't sell to discounters didn't mention it as a top performing brand.

Brand preferences at the individual chains also were rather modest.

**Top Sporting Goods Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Coleman | Wilson |
| Wilson | Spalding |
| Zebco | Rawlings |
| Spalding | Coleman |
| Huffy | Adidas |
| Garcia | Daiwa |
| Rubbermaid | Zebco |
| MacGregor | Penn |
| Franklin | Nike |
| Murray | Remington |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

At the individual chains, Ames shoppers were the least brand-conscious of the four discounters. Only 60% of Ames shoppers expressed brand preferences in sporting goods, compared with 69% at Wal-Mart, the most brand-conscious shoppers.

Ames shoppers also expressed significantly less preference for Wilson as their top brand, while responses among K mart, Wal-Mart and Target shoppers were nearly identical.

Spalding, in contrast, made its worst showing among Wal-Mart shoppers and its best among customers at Target.

In sharp changes of ranking from last year's survey, Rawlings moved up to No. 3 from 10th place, while Nike slipped to No. 9 from No. 4.

Adidas placed fifth; Reebok fell off the chart from sixth in 1989, and Coleman slipped to fourth place from third.

# Pennzoil Takes Checkered Flag in Automotives

Even though Pennzoil and Quaker State ranked No. 1 and No. 2 for the third year in a row among automotives shoppers, the percentage of those who preferred them over other brands slipped significantly, according to results of *DSN*'s 1990 Consumer Brands Survey.

The findings in this year's survey indicates that automotives shoppers at discount stores are scattering their brand preferences over a number of products.

Other changes this year include Castrol's move up from No. 8 in 1989 to No. 3, bumping Fram out of third place to No. 4. Champion, which has diversified from spark plugs into auto batteries and filters, jumped to a three-way tie for fourth with Fram and Turtle Wax from last place a year ago.

After the top three, only one percentage point separates the brands in descending order of ranking, indicating that a tiny shift in consumer preference either could knock a brand off the Top 10 chart completely or propel it up the ladder.

Consumers expressed a high degree of agreement with discount store managers about top automotive brands.

For the top two, consumers agreed completely with managers, who most often cited Pennzoil and then Quaker State as their top performing brands.

**Top Automotive Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Pennzoil | Pennzoil |
| Quaker State | Quaker State |
| Fram | Castrol/Castroil |
| Havoline | Fram |
| Prestone | Champion |
| Valvoline | Turtle Wax |
| AC-Delco | AC-Delco |
| Castrol/Castroil | Havoline |
| Turtle Wax | Valvoline |
| STP | Armor All |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

Aside from minor ranking differences, they also agreed on seven other 10 top brands, tying cosmetics as the two categories with the greatest agreement of top brands between the two groups. The only difference between managers and consumers in automotives was that managers regard STP as a best performing brand, placing it last on the Top 10 chart. In contrast, consumers put Armor All, instead of STP, in the 10th position on the Top 10.

With the increasing complexity of modern cars, oils and oil filters are playing a dominant role in do-it-yourself projects, and the top brands survey reflects that trend.

Of the Top 10 brands among consumers, oils account for five, Pennzoil, Quaker State, Castrol, Havoline and Valvoline, while Fram oil and air filters accounts for a sixth. And two, Turtle Wax and Armor All, are appearance products that do-it-yourselfers use.

**Consumer Brand Preferences In Automotives**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| **Pennzoil** | 18% | 18% | 19% | 19% | 14% |
| **Quaker State** | 13 | 12 | 13 | 13 | 15 |
| **Castrol/ Castroil** | 12 | 12 | 19 | 3 | 17 |
| **Fram** | 9 | 8 | 12 | 8 | 11 |
| **Champion** | 9 | 10 | 7 | 7 | 14 |
| **Turtle Wax** | 9 | 8 | 10 | 13 | 8 |
| **Havoline** | 8 | 8 | 7 | 7 | 2 |
| **AC-Delco** | 8 | 8 | 7 | 6 | 7 |
| **Valvoline** | 7 | 7 | 6 | 12 | 13 |
| **Armor All** | 6 | 6 | 4 | 2 | 8 |

*Source: DSN/Leo J. Shapiro & Assoc.*

Champion and AC-Delco, suppliers of spark plugs and batteries, represent a third category that DIY motorists find fairly easy to handle.

In comparison to other hard lines categories, consumers are significantly more brand-conscious, with more than eight of 10 expressing a brand preference in automotives. Only consumers of household cleaners and chemicals, photo and camera, and food, candy & snacks expressed a higher level of brand preference.

About one-half of the discount store shoppers surveyed said they would walk out of a store if they couldn't find their favorite brand, rather than switch to another.

But that probably isn't necessary since shoppers are confident they will find what they are looking for. In fact, one-half the automotives shoppers surveyed said they are sure of finding exactly what they seek.

Also indicating a high degree of brand-consciousness, fewer than two out of 10 shoppers expressed a preference for private label automotive products.

# Private Labels Gain Favor in Hardware

Hardware shoppers voice relatively little confidence they will find the brands they seek at their discount store.

*DSN*'s 1990 Consumer Brands Survey found that only 31% of hardware shoppers are sure they will find the labels they seek, lower than any other category in the survey except personal care appliances.

On a scale of 1 to 9 with 1 meaning no confidence and 9 meaning total confidence, shoppers gave hardware a mean 6.9, lower than all categories except women's apparel (6.6). In addition, 53% said they would skip the purchase if they couldn't find what they were looking for, equal with shoppers of housewares, household cleaners and women's apparel.

But hardware shoppers expressed a comparatively low brand preference percentage. Of these shoppers, 59% said they have a brand preference in hardware, lower than all categories except domestics and greeting cards.

These same customers also have a relatively high regard for private label merchandise, with 32% expressing a preference for private label hardware products. This is higher than all other categories except children's apparel, women's apparel and stationery.

As far as the top brands are concerned, this year's survey of consumer preferences turned out much like last year's. Black & Decker, Stanley and General Electric again ranked Nos. 1, No. 2 and No. 3.

Nonetheless, B&D strengthened its grip on first place, with more than two out of 10 discount store customers naming it as their preferred brand, compared with less than two out of 10 last year.

GE improved its No. 3 standing by a few percentage points, with one out of 10 citing it as their preferred brand, whereas Stanley just held its own.

In last year's survey, the last five on the Top 10, Lucite, Duracell, Skil, Rubbermaid and DuPont, all tied, with just one percentage point of shoppers naming it their favorite brand. In the 1990 poll, DuPont, Skil and Lucite again tied, this time with two percentage points. Duracell moved up one point to No. 6, while Vermont American replaced Rubbermaid.

**Consumer Brand Preferences In Hardware**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Black & Decker | 22% | 20% | 19% | 24% | 21% |
| Stanley | 13 | 13 | 13 | 9 | 15 |
| General Electric | 10 | 10 | 10 | 5 | 19 |
| Glidden | 5 | 5 | 7 | 5 | 5 |
| Dutch Boy | 4 | 5 | 3 | 3 | 6 |
| Duracell | 3 | 3 | 2 | 2 | 1 |
| DuPont | 2 | 2 | 4 | 3 | 4 |
| Skil | 2 | 3 | 4 | 3 | 2 |
| Lucite | 2 | 2 | 1 | 0 | 1 |
| Vermont American | 0 | 1 | 0 | 0 | 0 |

*Source: DSN/Leo J. Shapiro & Assoc.*

Discount store shoppers agreed with store managers, who named Black & Decker and then Stanley as their best performing brands. They also agreed on the inclusion of four other hardware brands on the Top 10 list.

Among managers, GE tied with Shop Vac for fifth place, behind Glidden, Skil and Great Neck. Managers also thought highly of McCullough and Royal, tied for No. 10 with Lucite.

In contrast, Shop Vac, Great Neck, McCullough and Royal drew too few preferred brand responses from consumers to figure at all in the ratings.

Conversely, managers thought too little of Duracell and Vermont American to place them among their Top 10 performing brands.

Among variations by chains, B&D produced its best showing among Target shoppers and its worst, by a small margin, among Wal-Mart customers.

**Top Hardware Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Black & Decker | Black & Decker |
| Stanley | Stanley |
| Glidden | General Electric |
| Skil | Glidden |
| Great Neck | Dutch Boy |
| General Electric | Duracell |
| Shop Vac | DuPont |
| McCullough | Skil |
| Lucite | Lucite |
| Royal | Vermont American |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

# In Toys, Mattel Edges F-P Among Consumers

Brand preference in toys fell sharply this year, the third consecutive year of decline in the category.

Just 62% of all consumers in *DSN*'s 1990 Consumer Brands Survey said they have a brand preference in toys, down 10 percentage points from 1989, becoming one of six categories with brand preference percentages below 63.

These same toy shoppers appear to be quite loyal to some popular toy labels, particularly Mattel, Fisher-Price, Milton-Bradley, Hasbro, Tonka, Playskool and Crayola, noting that if they didn't find the brand they sought, they would sooner skip the purchase than switch.

This year, 58% of toy shoppers said they would skip the purchase if they couldn't find what they were looking for, up from a year ago.

On a scale of 1 to 9 with 1 meaning no confidence and 9 meaning total confidence, shoppers gave toys a 7.3 confidence rating, down from 1988 and 1989 but still among the highest of the 18 merchandise categories surveyed. Also, 47% expressed total confidence.

Private label merchandise is not an alternative for toys shoppers. Just 9% expressed a preference for private label toys, down from 11% a year ago.

Overall, the No. 1 toy brand in consumers' minds is Mattel, which only edged out Fisher-Price by one percentage point. Shoppers at the Big Four discount chains were split on this with Wal-Mart and Target shoppers giving Fisher-Price the top spot on their lists. Only K mart shoppers put Mattel ahead of F-P. Ames shoppers rated the two equally.

The Top 10 toys brands this year included seven labels from 1989: Mattel, Fisher-Price, Tonka, Milton Bradley, Hasbro, Playskool and Crayola.

These were not the same seven toy brands store managers listed as their top performing brands. But consumers and store managers did agree on seven of the same brands including F-P, Mattel, Playskool, Little Tikes, Milton Bradley, Hasbro and Huffy.

Absent from the list is Teenage Mutant Ninja Turtles, named No. 7 by managers.

**Consumer Brand Preferences In Toys**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Mattel | 26% | 26% | 23% | 23% | 22% |
| Fisher-Price | 25 | 24 | 31 | 31 | 22 |
| Tonka | 7 | 10 | 10 | 8 | 4 |
| Milton Bradley | 7 | 7 | 7 | 5 | 0 |
| Hasbro | 7 | 6 | 10 | 7 | 8 |
| Playskool | 6 | 6 | 5 | 5 | 8 |
| Huffy | 5 | 5 | 0 | 2 | 8 |
| Little Tikes | 4 | 5 | 2 | 0 | 9 |
| Coleco | 4 | 4 | 2 | 7 | 0 |
| Crayola | 3 | 4 | 0 | 6 | 3 |

*Source: DSN/Leo J. Shapiro & Assoc.*

**Top Toy Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Fisher-Price | Mattel |
| Mattel | Fisher-Price |
| Playskool | Tonka |
| Little Tikes | Milton Bradley |
| Milton Bradley | Hasbro |
| Hasbro | Playskool |
| Teenage Mutant Ninja Turtles | Huffy |
| Huffy | Little Tikes |
| Lego | Coleco |
| Parker Brothers | Crayola |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

# Private Label Products Make Inroads in Stationery

Consumer preference for private label stationery products more than doubled this year from 1989.

In addition, stationery and women's apparel are the sole merchandise categories in *DSN*'s Consumer Brands Survey to receive more than one-third of consumers expressing a preference for private label products.

Consequently, consumer preference for branded stationery items dropped this year. Now 62% of stationery customers report a brand preference, down from 68% a year ago. Brand preference was particularly low among Target customers. Just 57% of them expressed a brand preference in the stationery department.

The most brand-conscious stationery shoppers are found at Ames. Sixty-seven percent of Ames shoppers said they prefer a specific stationery brand.

Regardless of the branded product selection at discount stores, customers are becoming less confident of finding what they want.

On a scale of 1 to 9 with 1 meaning no confidence and 9 meaning total confidence, stationery got a mean confidence score of 7.14, down from 7.49 in 1989. The number of customers who are certain—a 9 on the scale—of finding what they need, remained steady at 46%. Twenty percent said they were unsure of finding their preferred product.

Shoppers' declining confidence in the stationery department may translate into missed sales. More customers reported that they would skip a purchase rather than switch brands. This year one-third of stationery shoppers said they would skip the purchase if they couldn't find the brand they wanted, up from 29% in 1989.

The brand stationery shoppers said they prefer most is Hallmark, popular mostly for its greeting cards. However, Hallmark is not available at discount stores. Hallmark services this retail segment via its Ambassador division.

Mead, the No. 2 brand overall, was the second place brand among K mart, Wal-Mart and Target shoppers but third among Ames customers. Bic was second at Ames this year.

**Top Stationery Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Mead | Hallmark |
| Bic | Mead |
| Crayola | Bic |
| Papermate | Papermate |
| Stuart Hall | American Greetings |
| Cambridge | Scotch/3M |
| Rubbermaid | Pentel |
| Scripto | Parker |
| Pentel | Scheaffer/Eaton |
| Norcom | Erasermate |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

**Consumer Brand Preferences In Stationery**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Hallmark | 23% | 25% | 24% | 29% | 20% |
| Mead | 17 | 19 | 17 | 15 | 11 |
| Bic | 13 | 12 | 19 | 13 | 17 |
| Papermate | 6 | 5 | 3 | 11 | 8 |
| American Greetings | 4 | 5 | 5 | 2 | 3 |
| Scotch/3M | 3 | 3 | 3 | 5 | 9 |
| Pentel | 3 | 2 | 0 | 5 | 5 |
| Parker | 2 | 2 | 2 | 2 | 4 |
| Scheaffer/ Eaton | 2 | 2 | 0 | 4 | 0 |
| Erasermate | 1 | 1 | 3 | 2 | 0 |

*Source: DSN/Leo J. Shapiro & Assoc.*

If you think the New
KODAK STAR 35's are impressive,

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| Top Greeting Card Brands: Store Managers vs. Shoppers | |
|---|---|
| **Managers** | **Consumers** |
| American Greetings | Hallmark |
| Ambassador | American Greetings |
| Gibson | Ambassador |
| Sangamon | Forget-Me-Not |
| Hallmark | Crayola |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

**Consumer Brand Preferences In Greeting Cards**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| **Hallmark** | 70% | 69% | 70% | 71% | 64% |
| **American Greetings** | 15 | 14 | 19 | 10 | 19 |
| **Ambassador** | 1 | 2 | 2 | 2 | 0 |
| **Forget-Me-Not** | 1 | 0 | 2 | 0 | 0 |
| **Crayola** | 1 | 1 | 0 | 0 | 2 |
| **Other** | 6 | 6 | 3 | 6 | 0 |
| **Private Label/ Store Brand** | 13 | 12 | 13 | 15 | 19 |

*Source: DSN/Leo J. Shapiro & Assoc.*

# Among Greeting Cards Shoppers, Brand-Switching Is Commonplace

Consumers prefer Hallmark-brand greeting cards 5-to-1 over its closest rival, No. 2 American Greetings.

Obviously, greeting card consumers are unaware that Hallmark is unavailable to them at discount stores. Hallmark's mass market label is Ambassador, mentioned often enough by consumers in *DSN*'s Consumer Brands Survey to rank it the third most preferred brand.

The current Consumer Brands Survey questioned shoppers on their greeting card preferences for the first time in the survey's three-year history.

Because of its growth as a category, greeting cards was separated from stationery this year in both consumer and store manager polls this year. The consumer survey tracks respondents' willingness to switch or skip a purchase if their preferred brand is unavailable.

Of the five top performers or preferred greeting cards brands named by both groups, only three brands matched up: Hallmark, American Greetings and Ambassador. Sangamon and Gibson-Buzza were named top performers by store managers, and Forget-Me-Not, part of American Greetings, and Crayola, were named preferred brands by consumers.

Hallmark became the No. 1 brand in greeting cards by consumers due to a response rate of 70%. However, overall brand preference in this category remains very low. Just 51% of all greeting cards shoppers expressed a preference for a particular brand of greeting cards, the lowest brand preference rating of all 18 categories surveyed this year.

Ames customers claim to be the most brand-conscious of the Big Four chains when it comes to greeting cards. Fifty-nine percent of Ames' greeting card shoppers expressed a brand preference in this category, outpacing K mart and Wal-Mart shoppers by six percentage points and Target customers by five percentage points.

Despite consumers' low brand preference in greeting cards, they are fairly confident of finding what they want at their local discount store.

On a scale of 1 to 9 with 1 meaning no confidence and 9 meaning total confidence, shoppers gave greeting card departments a mean score of 7.31. In addition, 47% of respondents said they are certain—9 on the scale—of finding exactly what they seek.

Apparently, greeting card shoppers are satisfied with discounter's offerings in this category. Sixty-nine percent of respondents said if their preferred brand was unavailable, they would switch, meaning just 31% would skip the purchase, the lowest skip rate of any of the 18 categories other than children's apparel which received the same scores.

Despite this, consumers do not want private label greeting cards. Just 13% expressed a preference for private label greeting cards.

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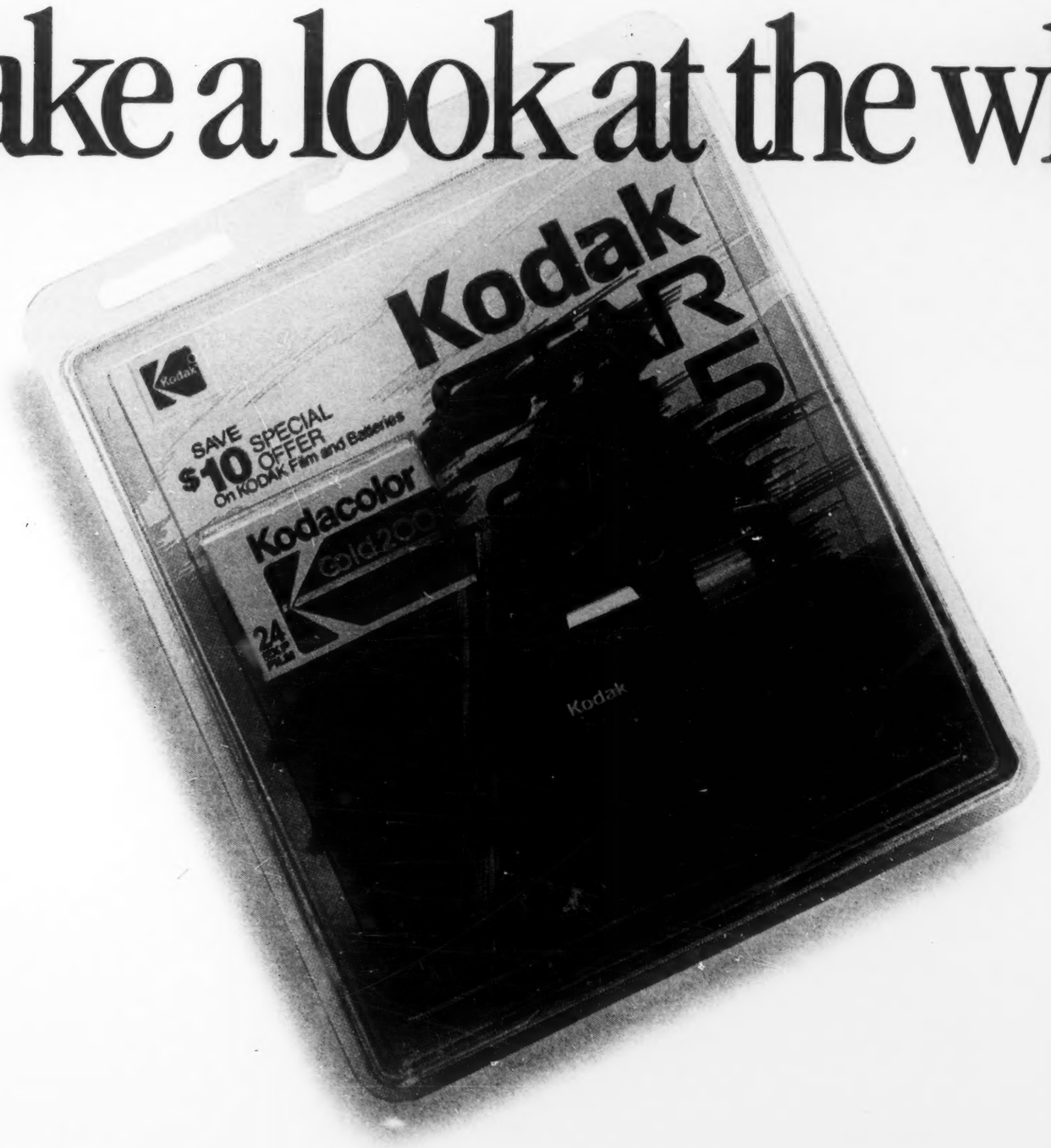


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# Crest Tops H&BA Category Once Again

Discount store consumers still prefer one health and beauty aids brand, Crest, above all others—and that product is also the one managers rated as the best performing H&BA item.

For the third straight year, Crest was the No. 1 health & beauty aids brand in in *DSN*'s Consumer Brands Survey, cited as the most preferred brand by just over one-fifth of the shoppers polled, six percentage points above last year's totals .

But the extensive array of H&BA merchandise resulted in consumers citing of many products in such small numbers that they didn't gain enough mentions to be listed on the survey. These other items each elicited less than 0.5% of mentions from consumers, but the total weight of these citations was just over 27% of the all responses, almost five percentage points ahead of Crest.

While brands continue to be very important in the H&BA arena, surveyed shoppers showed a weakening inclination to buy national brands, probably the result of so many alternatives in each subcategory.

In fact, the expressed preference dropped 10 percentage points from last year's probe to 82% on the current survey. H&BA shoppers are also among the most confident they will find what they are looking for. Of these shoppers, 52% said they are sure they will find the brand they seek.

K mart and Wal-Mart customers showed the strongest preference for particular brands, with 82% of the former's shoppers and 81% of the latter's customers indicating interest in specific items.

Target shoppers showed the least brand consciousness, with 72% denoting a preference for brands. Last year, 94% of Wal-Mart shoppers voiced an interest in brands, the greatest preference among consumers of the major discounters.

K mart customers, meanwhile, showed the least concern with only 91% saying they had a brand preference.

The strong showing among specific brands by Crest had two effects: it cut into the mention of other top products as consumer citation of other brands declined, and it resulted in major shifts in the ranks of other H&BA items.

Suave, which didn't make the Top 10 chart last year, shot into the No. 2 spot, replacing Colgate, which fell to No. 6.

Besides Suave, other brands that broke in to the Top 10 this year were: Charmin (No. 3); Coast (No.8); and Zest (No. 10).

A 40% change in the listing of the brands isn't unusual for H&BA, as the shoppers surveyed cited 64 national brands as well as noting such others as store brands and local labels.

**Consumer Brand Preference In Health & Beauty Aids**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| **Crest** | 22% | 20% | 20% | 15% | 26% |
| **Suave** | 9 | 8 | 13 | 6 | 4 |
| **Charmin** | 9 | 10 | 15 | 12 | 5 |
| **Revlon** | 8 | 9 | 10 | 7 | 6 |
| **Ivory** | 8 | 9 | 6 | 6 | 10 |
| **Colgate** | 7 | 8 | 3 | 11 | 6 |
| **Dial** | 6 | 4 | 2 | 2 | 6 |
| **Coast** | 5 | 6 | 5 | 0 | 3 |
| **Mennen** | 4 | 5 | 4 | 2 | 12 |
| **Zest** | 4 | 4 | 5 | 0 | 8 |

*Source: DSN/Leo J. Shapiro & Assoc.*

**Top Health & Beauty Aids Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Crest | Crest |
| Colgate | Suave |
| McNeil Labs | Charmin |
| Procter & Gamble | Revlon |
| Suave | Ivory |
| Johnson & Johnson | Colgate |
| Listerine | Dial |
| White Rain | Coast |
| Clairol | Mennen |
| Scope | Zest |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*

# Shoppers Still Sweet on Hershey's

Food, candy and snacks shoppers are the most confident of all of finding exactly the brand they want at their local discount store.

They also are among the easiest shoppers to please. If their preferred brand is unavailable, six out of 10 said they would switch to an alternative product. Private label brands, however, are not viable options for this customer. Only 8% expressed a preference for a private label product.

Food, candy and snack consumers are also among the most brand-oriented shoppers at discount stores. Target shoppers are particularly brand oriented when it comes for snack foods.

Eighty-four percent of all food, candy and snacks customers polled in *DSN*'s Consumer Brands Survey said they shop with a specific brand in mind, down slightly from a year ago when 88% claimed a brand preference. Nine out of 10 Target shoppers said they have a brand preference in this category, the highest total among discount chain shoppers.

Shoppers' preferences apparently are satisfied by discounters' selections. On a scale of 1 to 9 with 1 meaning no confidence and 9 meaning total confidence, snack food shoppers gave the department a mean confident score of 7.97, the highest of all 18 product categories surveyed this year.

In addition, 58% of these shoppers said they are certain—a 9 on the scale—of finding exactly what they seek. Only 9% said they are unsure of finding the brand they prefer.

Overall, consumers' first choice is Hershey's, the third consecutive year they named the popular confectionery label the No. 1 preferred brand.

Hershey's hold on the No. 1 spot was due to responses by K mart, Wal-Mart and Target customers, who named it a preferred brand nearly twice as often as No. 2 M&M/Mars.

Frito-Lay was the top brand at Ames. Hershey's was second followed by No. 3 Brach's, and M&M/Mars, Nabisco and Wise all tied for fourth place.

K mart shoppers said Frito-Lay, maker of Frito's corn chips and Lay's potato chips, was the No. 2 preferred brand. It was named fourth by Wal-Mart shoppers and fifth by Target customers.

M&M/Mars performed best among Target customers, but the brand was almost as popular with K mart and Wal-Mart shoppers. About one in six shoppers at those three chains named either M&M or Mars.

**Consumer Brand Preferences In Food, Candy & Snacks**

| Top Brands | Discount Shoppers | K mart | Wal-Mart | Target | Ames |
|---|---|---|---|---|---|
| Hershey's | 23% | 23% | 19% | 22% | 14% |
| M&M/Mars | 14 | 14 | 15 | 15 | 11 |
| Snickers | 14 | 14 | 17 | 14 | 10 |
| Brach's | 11 | 12 | 9 | 12 | 12 |
| Frito-Lay | 9 | 9 | 10 | 4 | 15 |
| Nabisco | 5 | 5 | 4 | 5 | 11 |
| Planters | 5 | 6 | 3 | 3 | 10 |
| Lays | 5 | 5 | 5 | 7 | 0 |
| Reese's | 5 | 2 | 4 | 7 | 6 |
| Keebler | 4 | 4 | 3 | 2 | 6 |

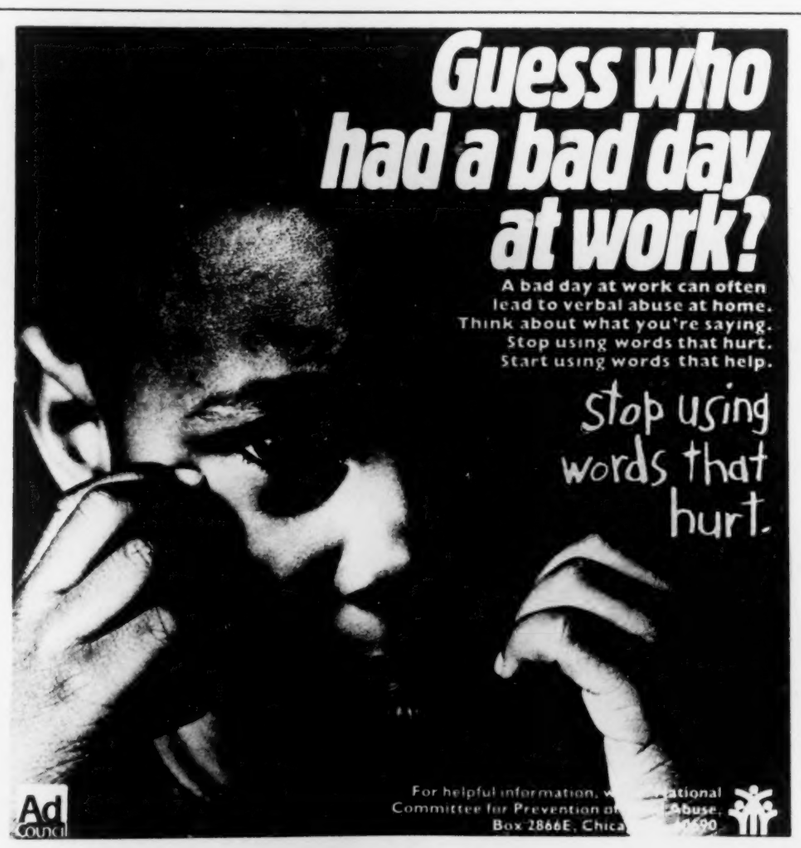
*Source: DSN/Leo J. Shapiro & Assoc.*

**Top Food, Candy & Snack Brands: Store Managers vs. Shoppers**

| Managers | Consumers |
|---|---|
| Frito-Lay | Hershey's |
| M&M/Mars | M&M/Mars |
| Hershey's | Snickers |
| Planters | Frito-Lay |
| Nabisco | Brach's |
| Brach's | Nabisco |
| Coke | Planters |
| Pepsi | Reese's |
| Ocean Spray | Keebler |
| Fisher | Wise |

*Top 10 rankings in each category are based on discount store managers' response to the question: 'What are your best performing brands in (department)?' and discount store consumers' response to the question: 'If you were shopping for (product) in a discount department stores, which brand of that product would you want?'*

*Source: DSN/Leo J. Shapiro & Assoc.*


Guess who had a bad day at work?
A bad day at work can often lead to verbal abuse at home.
Think about what you're saying.
Stop using words that hurt.
Start using words that help.
Stop using words that hurt.
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